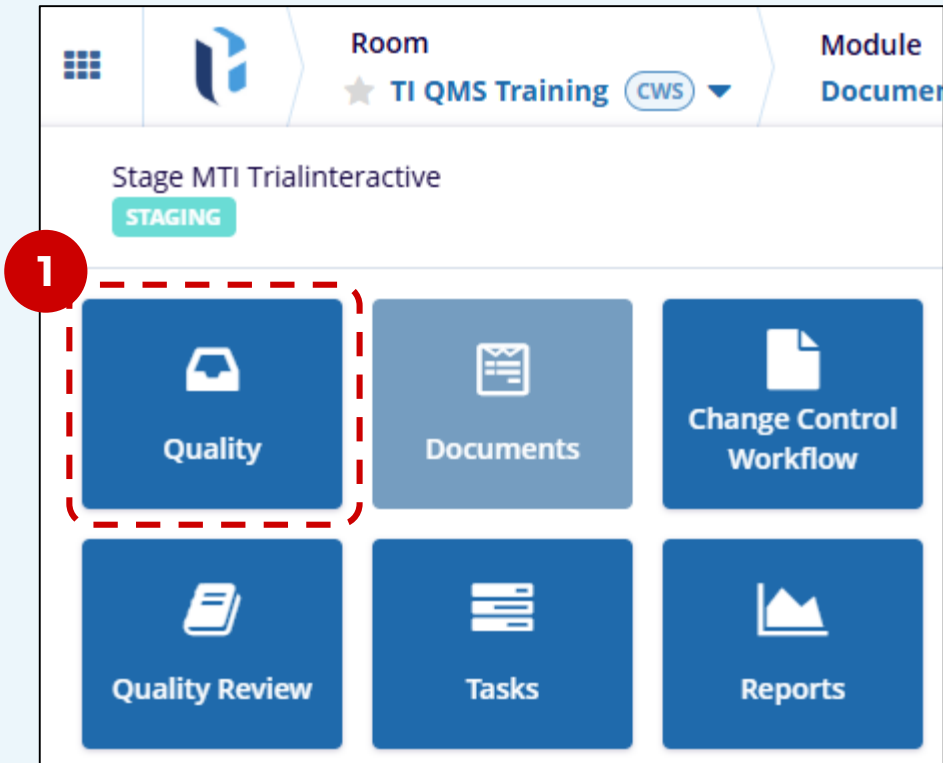


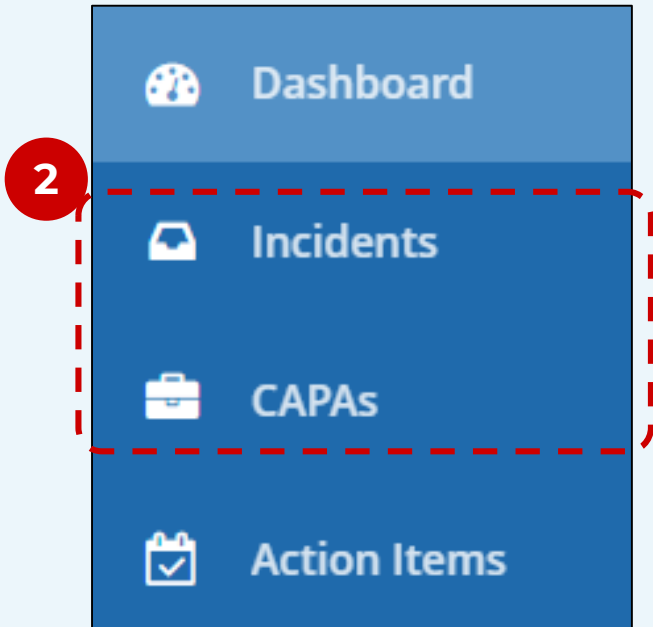
APPLICABLE TO:

- ☒ Admin
- ☒ Manager
- ☒ Editor
- ☐ Reader
- ☒ QMS
- ☐ eISF

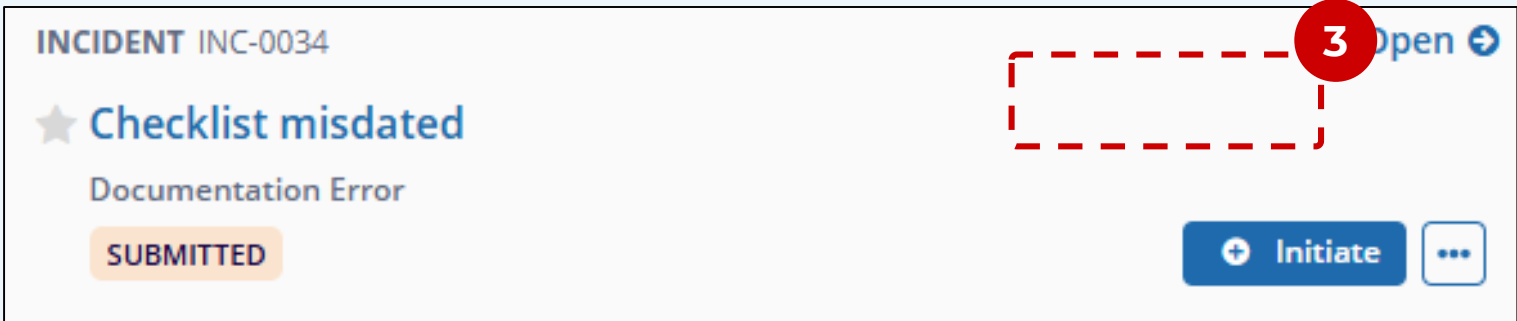
**1** Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Quality** module (the name may vary).



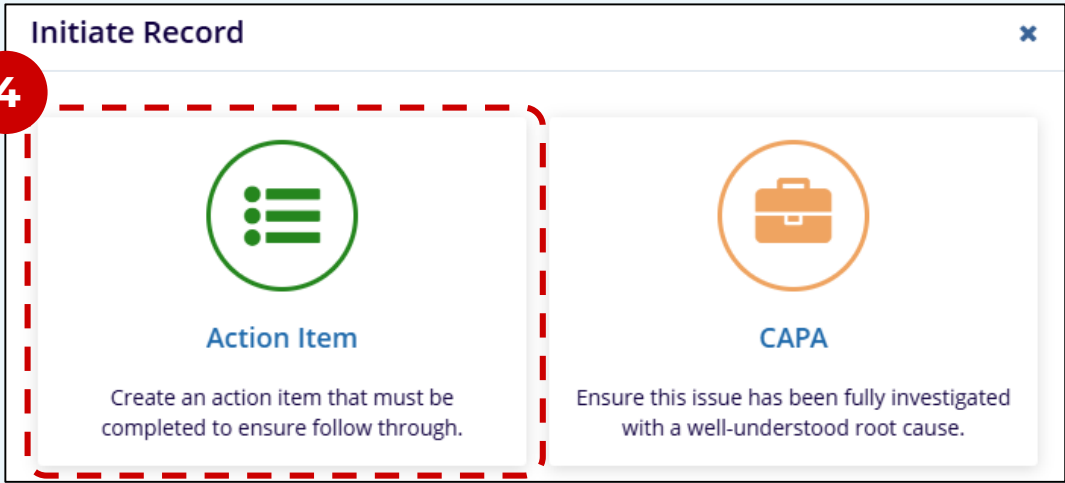
**2** Enter one of the **Records lists** from the navigation sidebar.



**3** Action Items are created as follow ups to Incidents or CAPAs. Select a record and click the Initiate button displayed above the side panel.

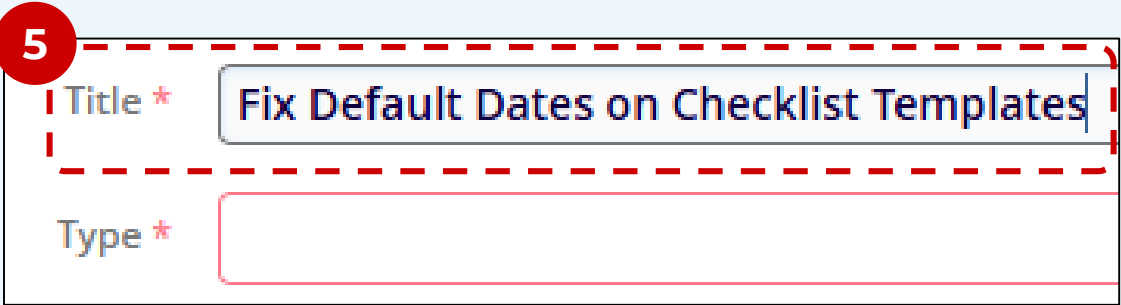


4 Click on the option for **Action Item**.



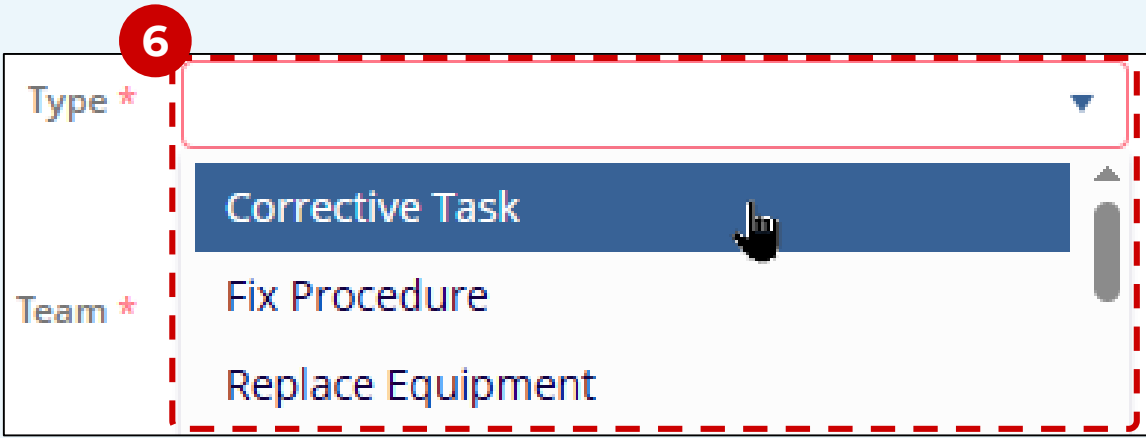
The 'Initiate Record' dialog box shows two options: 'Action Item' and 'CAPA'. The 'Action Item' option is highlighted with a red dashed box and a red circle with the number 4. It features a green icon of three horizontal lines and the text 'Create an action item that must be completed to ensure follow through.' The 'CAPA' option features an orange icon of a briefcase and the text 'Ensure this issue has been fully investigated with a well-understood root cause.'

5 Give a **Title** to the Action Item.



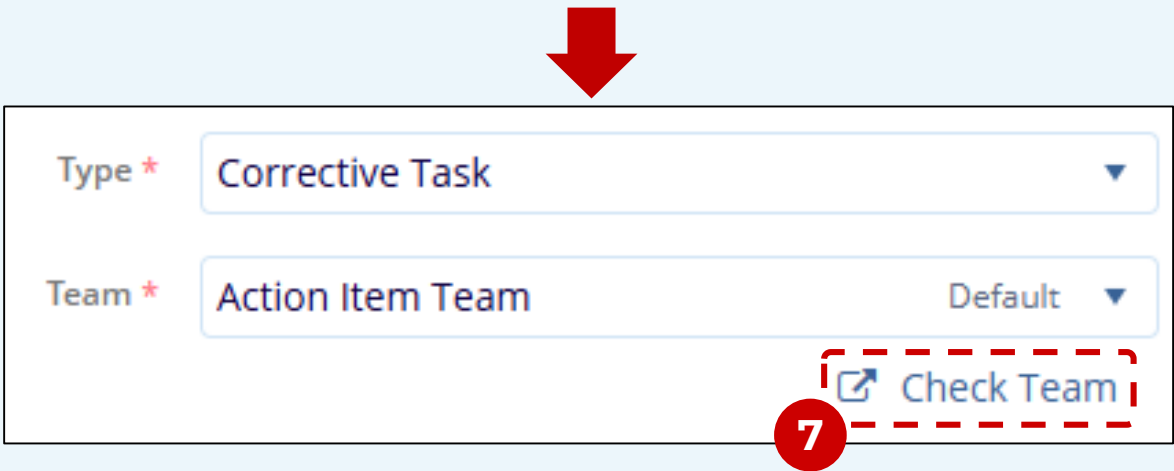
The form shows the 'Title' field with the text 'Fix Default Dates on Checklist Templates' and the 'Type' field, both highlighted with a red dashed box and a red circle with the number 5.

6 Select the Type of Item from the **Type** dropdown.  
This will also auto-select the Team assigned to that type, if any.



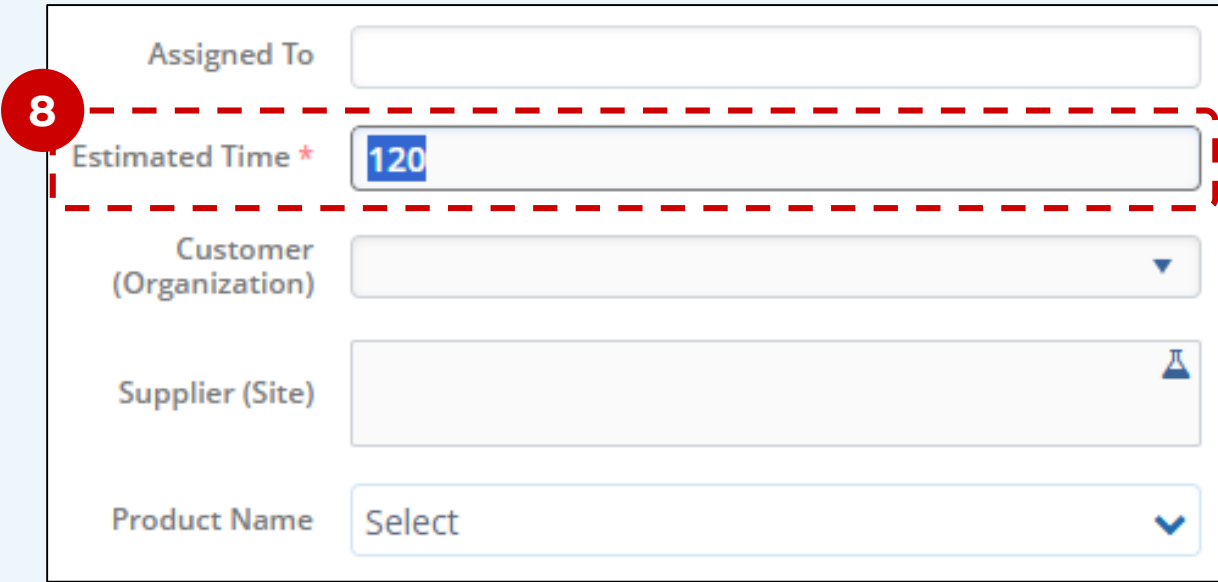
The 'Type' dropdown menu is open, showing options: 'Corrective Task', 'Fix Procedure', and 'Replace Equipment'. A red dashed box and a red circle with the number 6 highlight the dropdown.

7 The **Check Team** button allows you to review what users are members of the selected Team.



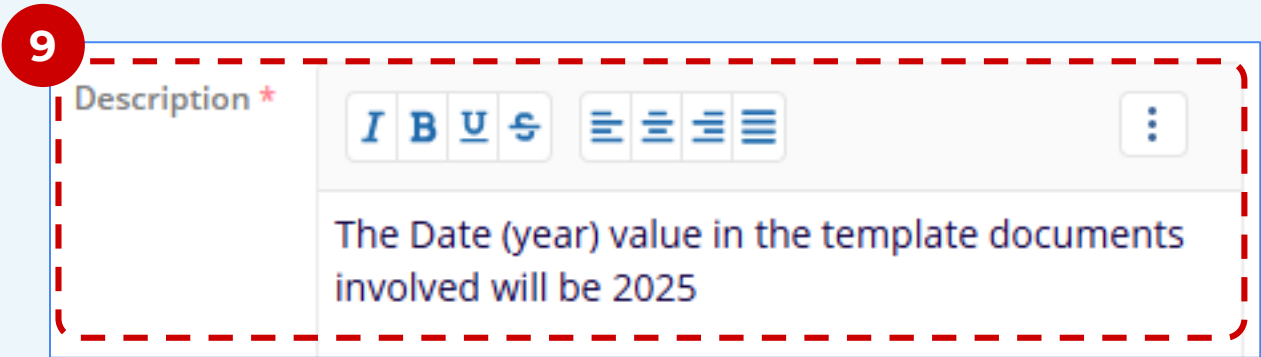
The form shows the 'Type' dropdown set to 'Corrective Task' and the 'Team' dropdown set to 'Action Item Team'. A red dashed box and a red circle with the number 7 highlight the 'Check Team' button.

8 Set the **Estimated Time** field (in this example, value is in minutes). Also change or define the other fields as required.  
Available fields may vary due to configuration differences.



The form shows the 'Estimated Time' field set to '120', the 'Customer (Organization)' dropdown, the 'Supplier (Site)' dropdown, and the 'Product Name' dropdown. A red dashed box and a red circle with the number 8 highlight the 'Estimated Time' field.

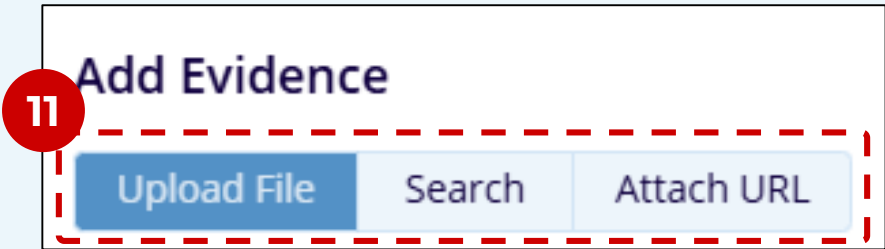
9 Write a **Description** and populate any other text fields (these may vary).



10 Click on **Next** to move to the second part of Incident setup, which is adding evidence.



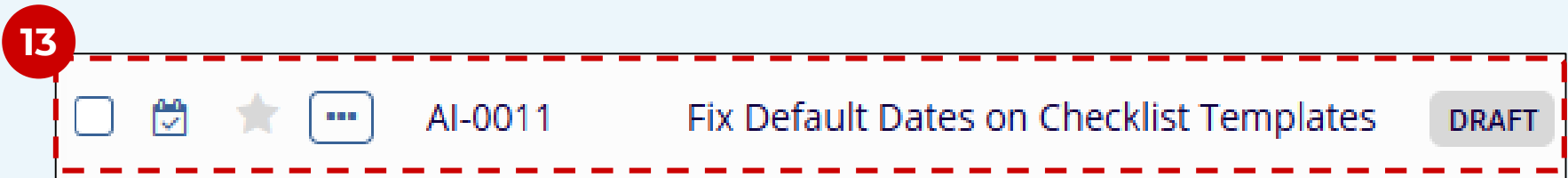
11 Choose how you'll add evidence. You may Upload files, Search for existing content in the current room, or type/paste URLs.



12 Complete Adding Evidence as chosen, then click **Create** to generate a Draft, or **Create & Submit** to send the Action Item to the first contributor.



13 Once Created, item can be found in the Action Items list with its current status.



**14** Only if you chose Create in step 12, the Action Item can be advanced from Draft to active status by clicking the **Submit for** button above the side panel.

